

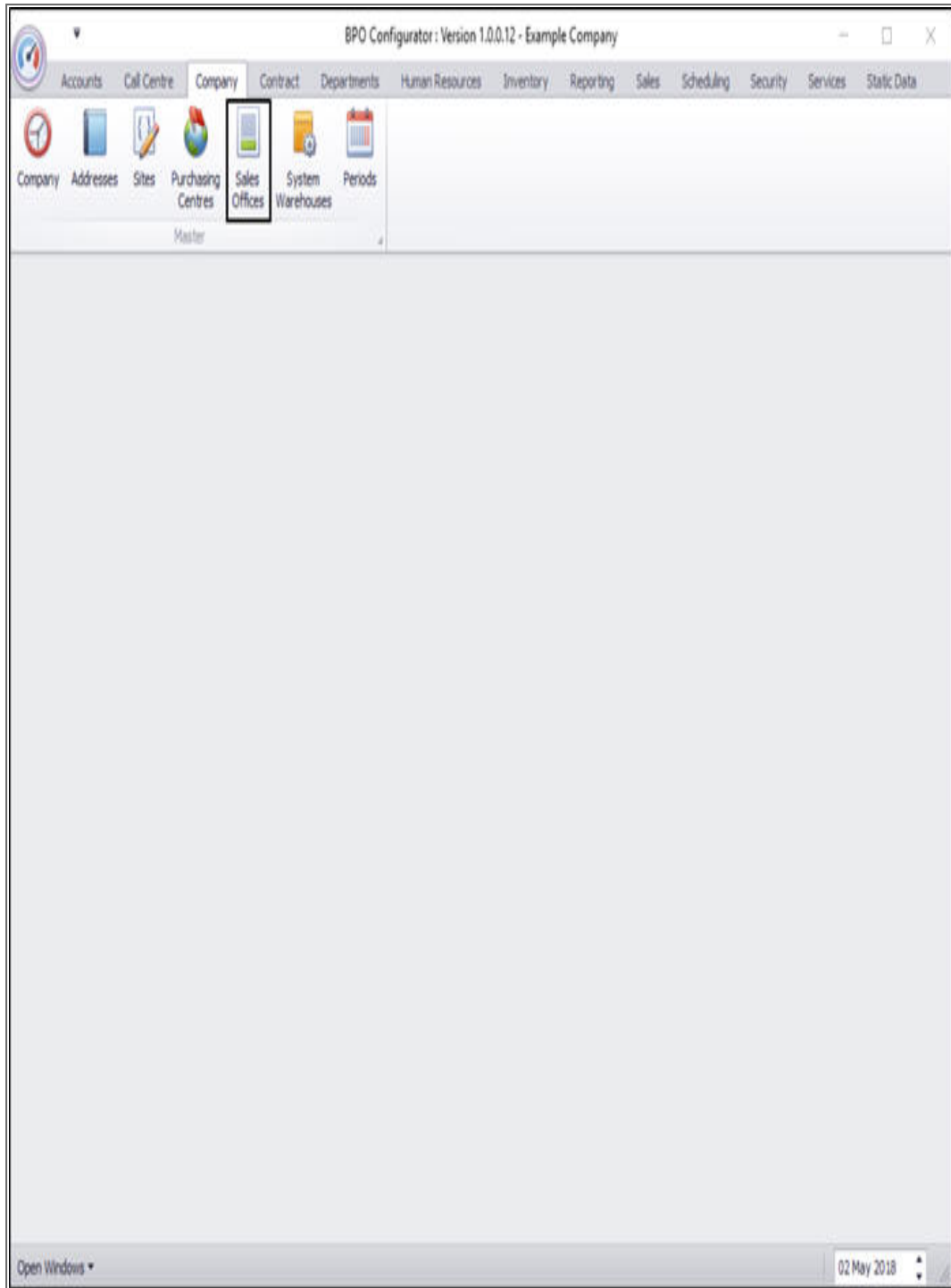
COMPANY

SALES OFFICES – ADDRESS

When configuring Sales Office addresses, it is important to note that a **Billing** address type must be set up, as this address will pull through on the Sales Invoice.

You can also set up **Physical**, **Postal** and **Shipping** addresses.

Ribbon Access: *Configurator > Company > Sales Offices*



The ***Sales Office Listing for Company: []*** screen will be displayed.

- Click on the **row selector** in front of the **sales office** that you wish to **add** an address to.
- Click on **Edit**.

Sales Office Listing for Company : Example Company - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Add Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Cut... E...

SalesOfficeCode	SalesOfficeName	InvoicePrefix	NextInvNo	QuotePrefix	NextQuoteNo	CrNotePrefix	NextCrNoteNo	OrderPrefix	NextOrderNo	ClaimPrefix	NextClaimNo	NextRcptNo
SO	Sales Office	INV	426	QT	205	CN	114	OR	239	WC	16	
CSO	Cape Town Sales Office	CDN	1	CQT	1	CCR	1	CSO	1	CWC	1	

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The **Edit Sales Office: []** screen will be displayed.

Either

- **Right click** anywhere in a **new row** of the **Addresses** frame.

Edit Sales Office : Cape Town Sales Office - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout Workspaces

Process Format

Sales Office Configuration Details

Code: CSO

Sales Office Name: Cape Town Sales Office

Manager: Bianca Du Toit

Default Commercial Markups

Assets: 10

Inventory: 10

Labour: 10

Sub Contracts: 10

References

Prefix

Next Invoice No.: CIN 1

Next Quote No.: CQT 1

Next Credit Note No.: CCR 1

Next Order No.: CSO 1

Next Claim No.: CWC 1

Banking

Bank Name: FNB

Account Name: Company Name

Account Number: 123456789

Branch Name: FNB

Sort Code: 12345

Sales

Invoice Header: Cape Town Sales

Quote Validity: 14

Default Cash Sales Account: CUS001 - Cash Sales Account

Include Quote Cover Page: ☒

Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAcc
☒	Cape Town	1100	1000
☐	Durban		
☐	Johannesburg		

Addresses

AddressType	AddressContactName	Address1	Address2	Address3
BILL	Mark Sanders	PO Box 1233	New Town	Forest Hills

Open Windows

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- A **Maintain** menu will pop up.
- Click on **Add** - Add New Address

Edit Sales Office : Cape Town Sales Office - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout Workspaces

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Next Quote No.: CQT 1

Next Credit Note No.: CCR 1

Next Order No.: CSO 1

Next Claim No.: CWC 1

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Account Number: 123456789

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Sort Code: 12345

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Invoice Header: Cape Town Sales

Quote Validity: 14

Default Cash Sales Account: CUS001 - Cash Sales Account

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Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAcc
☒	Cape Town	1100	1000
☐	Durban		
☐	Johannesburg		

Addresses

AddressType	AddressContactName	Address1	Address2	Address3
BILL	Mark Sanders	PO Box 1233	New Town	Forest Hills

Add New Address

Open Windows

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Or

- Click in the **Address Type** text box in the **Addresses** frame.
- An **ellipsis** button will be revealed.
- Click on this button.

Edit Sales Office: Cape Town Sales Office - BPO Configurator: Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout Workspaces

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Account Name: Company Name

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Branch Name: FNB

Sort Code: 12345

Sales

Invoice Header: Cape Town Sales

Quote Validity: 14

Include Quote Cover Page: ☒

Default Cash Sales Account: CUS001 - Cash Sales Account

Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAcc
☒	Cape Town	1100	1000
☐	Durban		
☐	Johannesburg		

Addresses

AddressType	AddressContactName	Address1	Address2	Address3
BILL	Mark Sanders	PO Box 1233	New Town	Forest Hills
I	...			

Open Windows

02 May 2018

Both methods will bring up the **Select an Address Type** screen.

- Click on the **row selector** in front of the **address type** that you wish to **add** to this sales office.

Note: As a billing address has already been set up on this sales office, a **Physical** address has been selected in this example.

- Click on **Ok**.

Edit Sales Office : Cape Town Sales Office - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

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Code CSO

Sales Office Name Cape Town Sales Office

Manager Bianca Du Toit

Default Commercial Markups

Assets 10

Inventory 10

Labour 10

Sub Contracts 10

Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAcc
☒	Cape Town	1100	1000
☐	Durban		
☐	Johannesburg		

References

Prefix

Next Invoice No.

Next Quote No.

Next Credit Note No.

Next Order No.

Next Claim No.

Ok Back Save Layout

Process Format

Banking

Sales

Invoice Header

Default Cash Sales Account

Drag a column header here to group by that column

RdCode	RdCodeDescription
BILL	Billing
PHYS	Physical
POST	Postal
SHIP	Shipping

Addresses

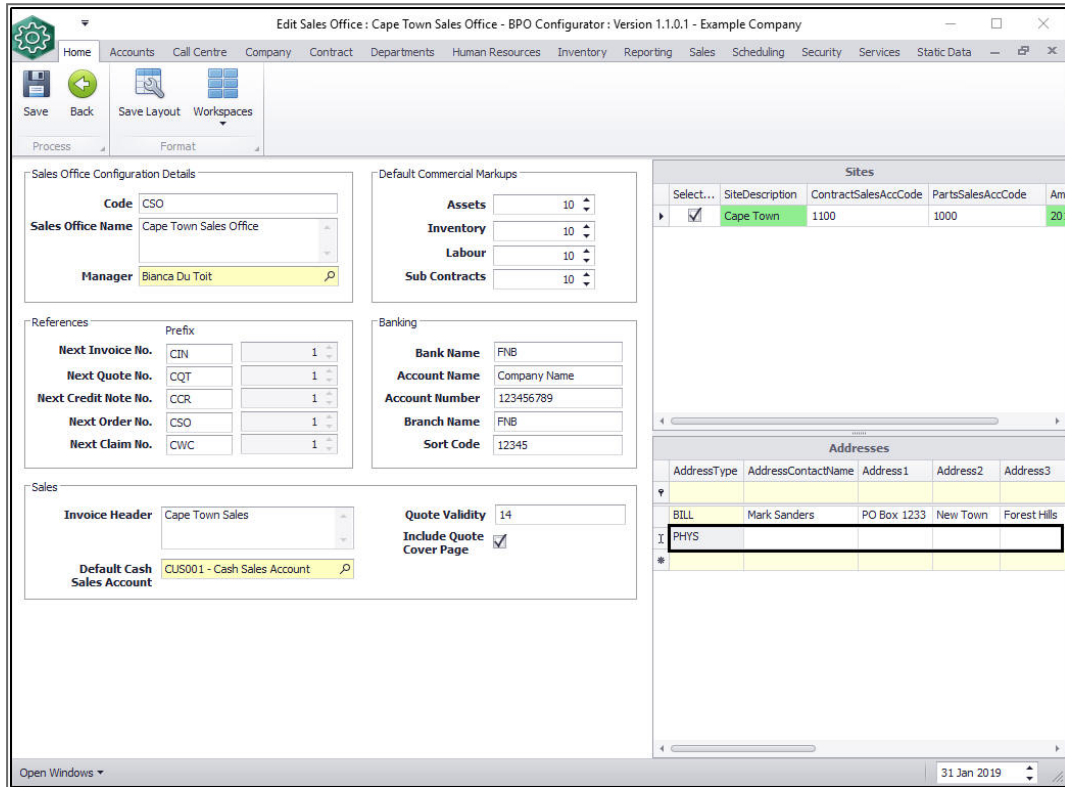
AddressType	AddressContactName	Address1	Address2	Address3
BILL	Mark Sanders	PO Box 1233	New Town	Forest Hills
I	...			

Open Windows

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- **Address Type:** This will now be populated with the address type selected in the previous step.

- **Address Contact Name:** Type in the address contact name.
- **Address 1:** Type in the first line of the address.
- **Address 2:** Type in the second line of the address.
- **Address 3:** Type in the third line of the address.



- **Scroll right** if necessary, to view the next columns in the row.

Edit Sales Office : Cape Town Sales Office - BPO Configurator : Version 1.1.0.1 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout Workspaces

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Banking

Bank Name: FNB

Account Name: Company Name

Account Number: 123456789

Branch Name: FNB

Sort Code: 12345

Sales

Invoice Header: Cape Town Sales

Quote Validity: 14

Include Quote Cover Page: ☒

Default Cash Sales Account: CUS001 - Cash Sales Account

Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAccCode	Am
☒	Cape Town	1100	1000	203

Addresses

AddressType	AddressContactName	Address1	Address2	Address3
BILL	Mark Sanders	PO Box 1233	New Town	Forest Hills
PHYS	James Rowe	1 New Road	New Town	Hillcrest

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- **City:** Type in the city name.
- **Postal Code:** Type in the postal code.
- **County:** Type in the county name.
- **Country:** Type in the country name.
- **Tel No:** Type in the telephone number.

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Invoice Header: Cape Town Sales

Quote Validity: 14

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Include Quote Cover Page: ☒

Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAccCode	Am
☒	Cape Town	1100	1000	203

Addresses

Address3	City	PostalCode	County	Country	TelNo
Forest Hills	Durban	1234	KZN	South Africa	031 123 4567
Hillcrest					

Open Windows 31 Jan 2019

- **Scroll right**, if necessary, to view the remaining columns in the row.

Edit Sales Office : Cape Town Sales Office - BPO Configurator : Version 1.1.0.1 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

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Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAccCode	Am
☒	Cape Town	1100	1000	203

Addresses

Address3	City	PostalCode	County	Country	TelNo
Forest Hills	Durban	1234	KZN	South Africa	031 123 4567
Hillcrest	Durban	1234	KZN	South Africa	010 200 3000

Open Windows 31 Jan 2019

- **Tel Ext:** Type in the extension number.
- **Fax No:** Type in the fax number.
- **Email Address:** Type in the email address.

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Include Quote Cover Page: ☒

Sites

Select...	SiteDescription	ContractSalesAccCode	PartsSalesAccCode	Am
☒	Cape Town	1100	1000	203

Addresses

Address3	City	PostalCode	County	Country	TelNo
Forest Hills	Durban	1234	KZN	South Africa	031 123 4567
Hillcrest					

Open Windows 31 Jan 2019

- The last column is the **Default Address** column.
- As the **Billing** address must be the default address and there can only be one default address, **NO** has been selected for this new Physical address.

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Select...	SiteDescription	ContractSalesAccCode	PartsSalesAcc
☒	Cape Town	1100	1000
☐	Durban		
☐	Johannesburg		

Addresses

TelNo	TelExt	FaxNo	EmailAddress	DefaultAddress
031 123 4567	147	031 123 4545	ms@noemail.com	Yes
031 123 9876	101	031 123 3322	y@noemail.com	No

Open Windows

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- When you have finished adding the new sales office address details, click on **Save**.

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☐	Durban		
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Quote Validity: 14

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Default Cash Sales Account: CUS001 - Cash Sales Account

Addresses

Address...	AddressContactName	Address1	Address2	Address3
BILL	Mark Sanders	PO Box 1233	New Town	Forest Hills
PHYS	James Rowe	5 Old Street	Hillcrest	Old Town

- The new address details will be **saved** and you will return to the **Sales Office Listing for Company: []** screen.

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